PURCHASE ORDER
09/22/2005

1. Logon

Enter Logon info, and click "Logon".

2. Create document

Click "Create Document"

3. Select document type

Click on "Document Type", and Select "Purchase Order".

4. Create from requisition

1. Select "Create From Requisition".

2. You may choose a system generated Purchase Order Number.

3. Click "Continue."

5. View requisition line items

1. Type in the requisition number then click display to select the requisition to create the PO from.

2. Click on "Y" to see line items below.

3. Select the line items from the Requisition, you may click each desired box, or click "Select all" to choose all the line items, then click "Create".

6. View the requisition (if necessary) (steps 6,7,8)

Click on "Navigator" if you wish to view the PR.

7. Click the link to the requisition

Click on the link to the Requisition.

8. Viewing the requisition

We are now in the main Requisition information, you may look at the information as you choose. To exit the Requisition, click "Navigator".

9. Return to the Purchase Order

Click on the link to the Purchase Order or "Award" to get back to the Purchase Order that you have begun.

10. Add the Vendor

Click List of Values button to add Vendor.

11. Searching for the Vendor

1. Enter name of Vendor and click "Display".

2. Select correct Vendor from the list of Vendors.

12. Select the Primary Product/Service Code
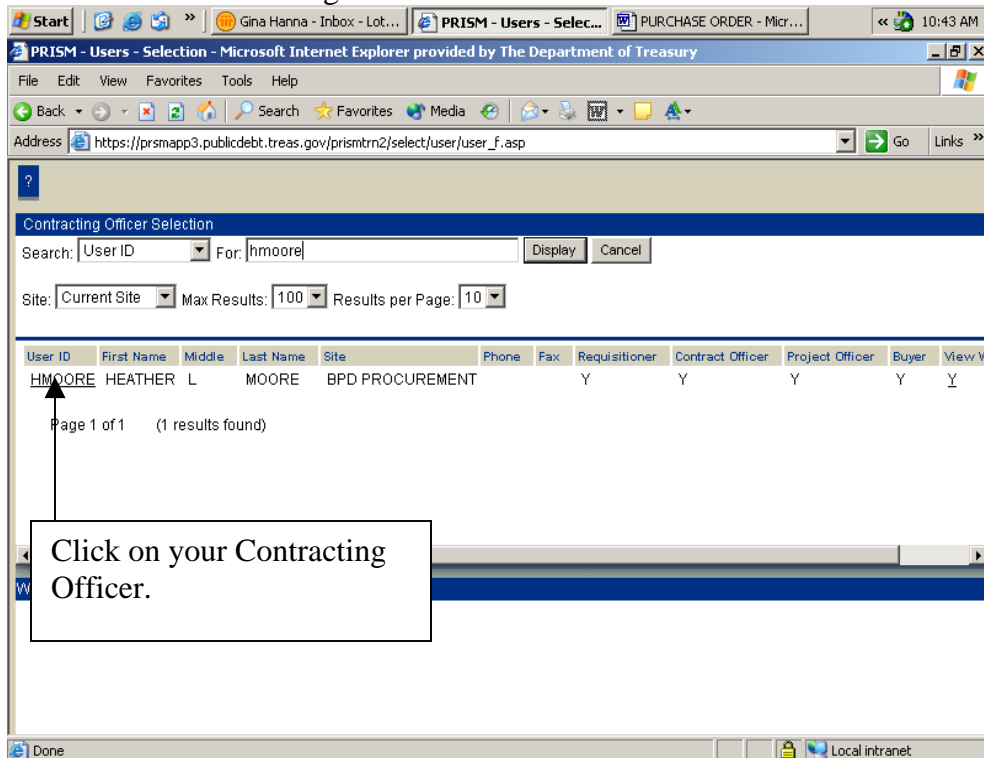

1. The system fills in the Duns Number of the Vendor.

2. Click on the List of Values to select "Contracting Officer" (see step 13).

3. Change PR to the correct product/service code by using the List of Values button.

13. Select the Contracting Officer
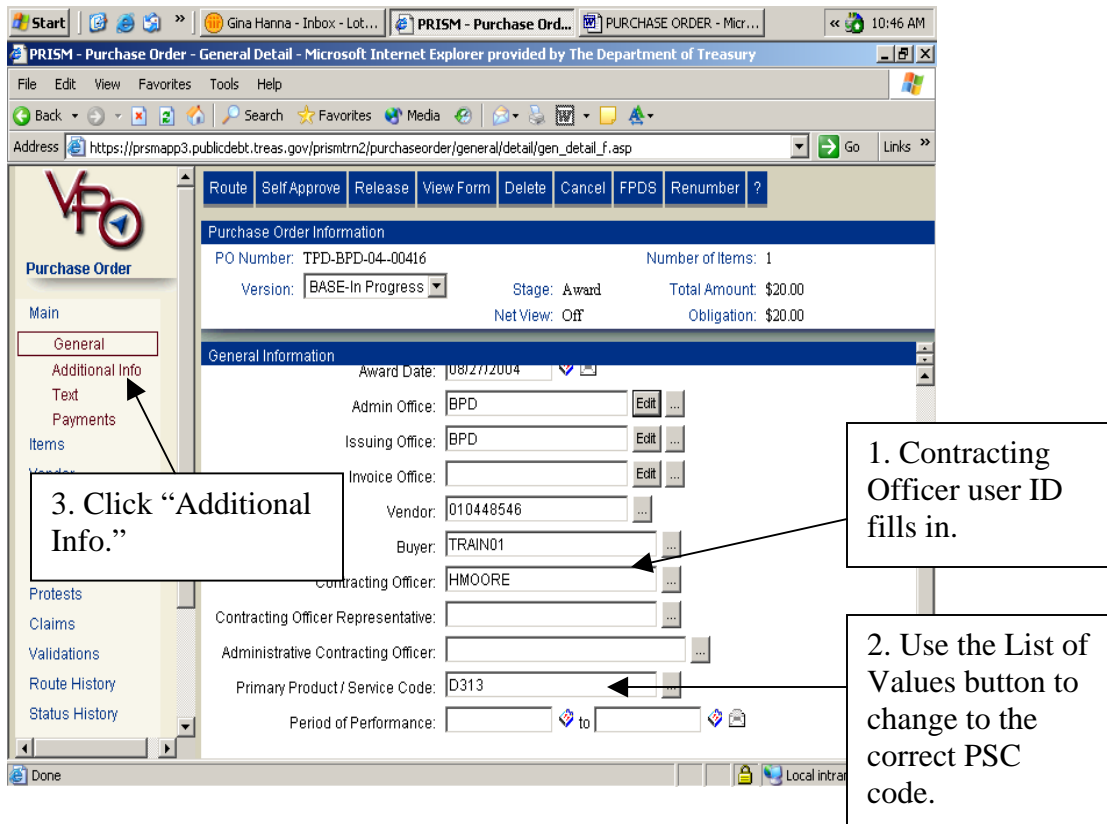
Click on your Contracting Officer.

14. Click Additional

3. Click "Additional Info."

1. Contracting Officer user ID fills in.

2. Use the List of Values button to change to the correct PSC code.

15. NAICS, Invoice Approver, Performance Dates

1. Enter the NAICS code using the List of Values button.

2. Type in the Invoice Approver/COR.

3. If a service, enter "Performance Start Dates" and "End Dates" in this section.

4. Enter credit card vendor if appropriate.

5. Click "Text"

16. Inserting text

If you wish to insert standard notes in the Header or Footer, click on "Statements", or you may type directly in the text boxes.

17. Viewing Statement content

If necessary, click here to preview text, prior to actually inserting. See Below on this Screen Shot.

Click on the Title of the link to the statement you want to insert onto your form.

18. Inserted Statement text

The text is inserted into the chosen text box.

Click on "Payments"

19. Search for payment terms

Click on the List of Values button to view payment terms.

20. Select the appropriate payment terms

Choose the appropriate payment terms.

21. The payment terms are inserted

All the Payment Information fills in.

Click on "Items."

22. Choose the line item to edit if applicable

1. Click the hyperlink to edit the chosen line item information if necessary.

23. Edit requisition information if necessary

24. Select PO1

25. Select the Address Code

Click on the List of Values button next to "Address Code."

26. Choose External

2. Then click Display.

1. Choose "External" from the Address Type drop down.

27. Select the Address Code

Select the Address Code (DUNS Number).

28. Click Submit

1. The DUNS fills in.

2. The correct address fills in.

3. Click "Submit".

29. Select Package

1. Click on "Package."

2. Select "Change Form."

30. Select the Form

Choose the correct "Form" by clicking the link.

31. Edit the Form

The form info fills in. If necessary you can override system-calculated information on the form, by clicking "Edit." You may also "View Form".

32. View the Form

Click View Form.

33. Launching the Form

The form may launch in your current browser, or it may launch in a separate browser, depending on your Internet Settings. If it launched in your current browser then click the browser's "Back" button to return to PRISM. Otherwise, just click the "X" at the top of the browser to close the new window when you are done.
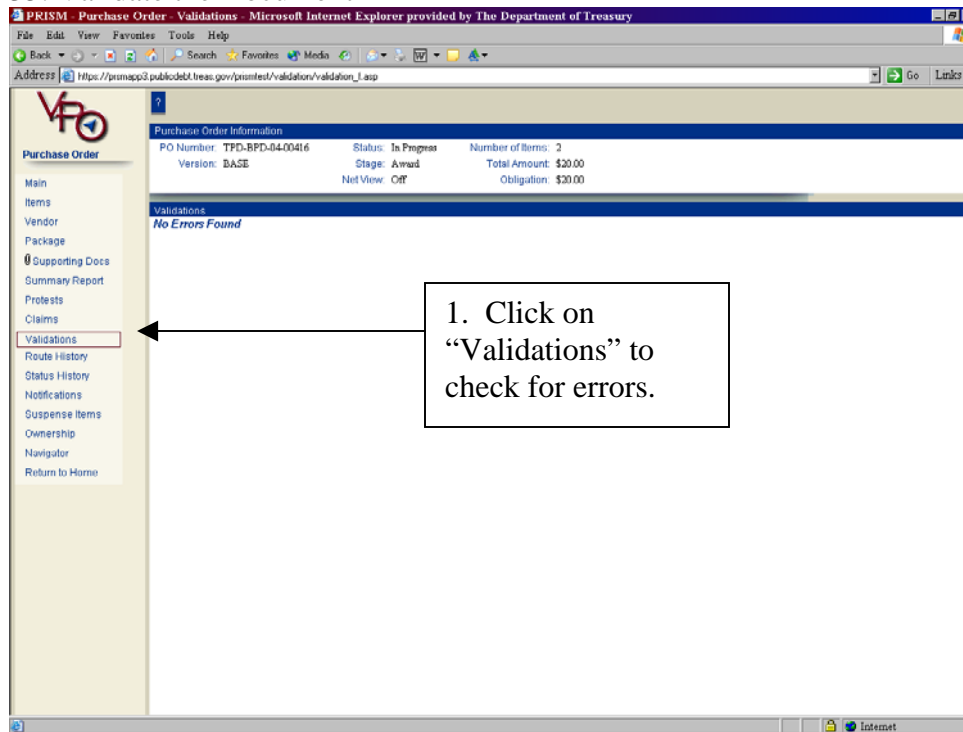
34. Return to the Main Menu

Click "Cancel" to return to the menu.

35. Validate the Document

1. Click on "Validations" to check for errors.

If errors are found, correct all errors before launching FPDS.

Launch FPDS after the document is complete but before routing for approval. See FPDS QRG for guidance.

Route for approval. See Routing QRG for guidance.